QHR Accuro EMR Guide: Virtual Care

Introduction

This EMR guide will provide recommendations about how to utilize the QHR EMR to support Virtual Care. Virtual visits enable patients to communicate with their health care team from wherever they are, and in a way convenient for both the patient and the provider. There are additional options to explore within the features and functionality of the EMR to accomplish the recommended steps outlined in this guide. EMR specific guides are available online at:

https://actt.albertadoctors.org/EMR/Pages/default.aspx

Some key principles at this time are:

1) Document patients' e-mail addresses and cell phone numbers in patient demographics as these are required for virtual care purposes
    - Clinics already using on-line scheduling and text reminders are well poised for virtual care services
2) Obtain Consent. Following the <u>CPSA advice on virtual care</u>, while regulated virtual care platforms are preferred, unregulated virtual platforms may be used in pandemic circumstances. When using virtual platforms for health purposes, it is important that express patient consent is obtained, even verbally, and recorded in their chart.

Special Note: The COVID-19 pandemic is currently putting extraordinary pressure on the health care system. Virtual Care processes allow physicians that have the capacity to provide quality patient care during this time.

Central to this effort is the importance of limiting viral spread by:

- reducing unnecessary patient and physician travel within Alberta and between Alberta and other jurisdictions;
- reducing unnecessary patient presentations to health facilities, and;
- enabling physicians to provide remote patient service within Alberta or from other jurisdictions.

The adoption of virtual care practices can help achieve these goals by enabling the remote:

- screening of patients who are worried or ill;
- care of patients with suspected COVID-19;
- care for other patients in your practice with the intent of decreasing exposure to those who may be ill; and
- care of patients when the physician is self-isolated but well enough to work.

Macros

Macros are very versatile and powerful tool for use with your progress notes. They enable any team member to quickly enter a formatted block of text. They save time by entering blocks of repetitive text and ensure that data is uniformly formatted and serve to remind the user to enter data, even with multiple users, which makes searching for data much easier. *Protip:* Using the macro wizard, create *macros to enter Date and Time into chart notes. Example: Configure the letter "T" as a macro. In a chart, enter "T> control> enter" and it will insert the current time into the note. Very helpful for start and end times of a note. Use "D" for date. Another helpful one is the F12 key, to insert the user name, date and time.*

To create a Macro:
1. From within a SOAP note, right-click and select "Find Macro"
2. Letter Macros box will appear. Select "New", enter a name with no spaces.
3. Type Macro content in large square box and "Close"
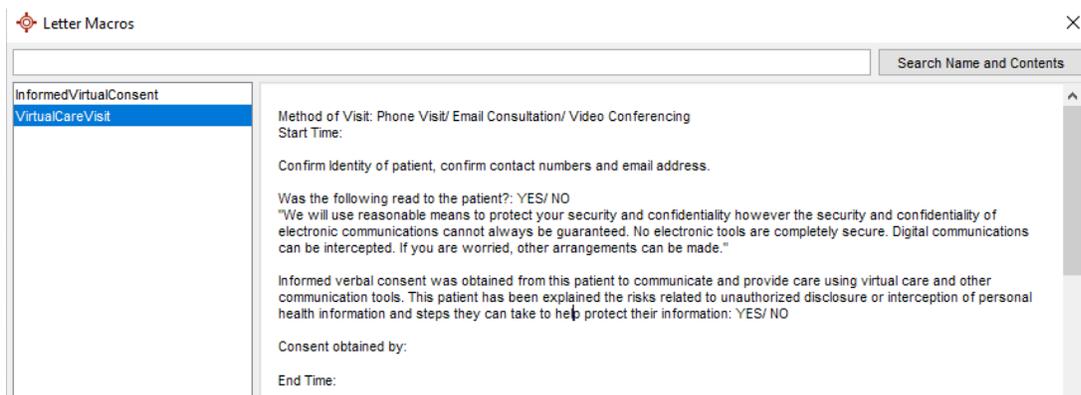
Once the Macro has been created it is ready for use.

1. From the SOAP note, right-click and select "Find Macro"
2. Highlight the Macro you just created and click "Select". This will insert it where the cursor is.

Create a Macro for virtual visit OR simply the informed consent itself.
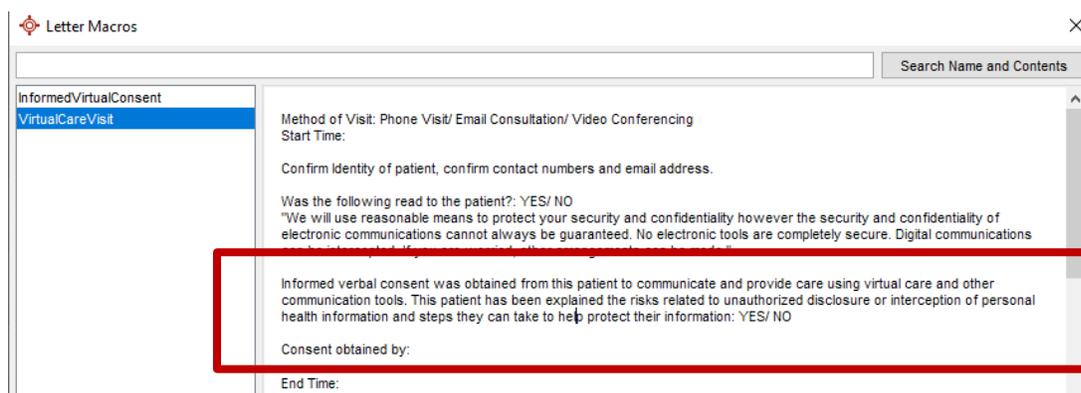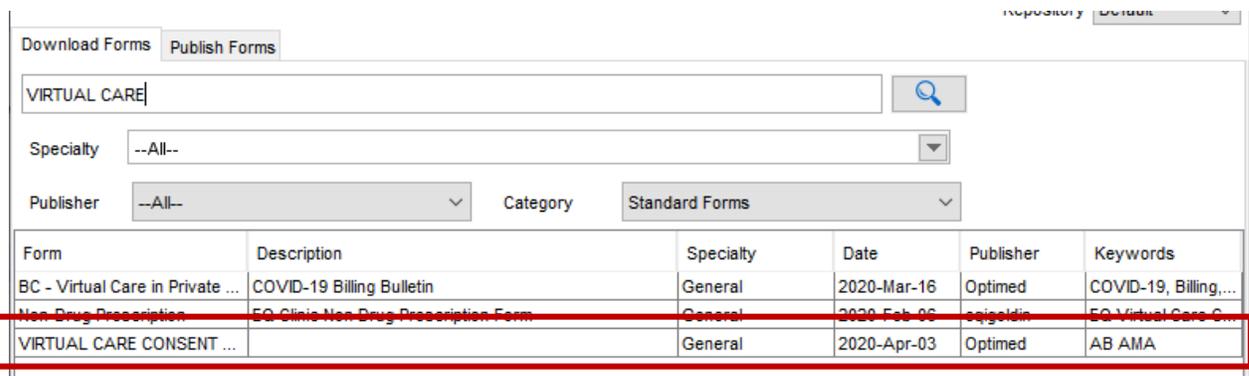
Informed and Documenting Consent

Patients need to be informed of what virtual care services are being provided and how they will be communicated (via clinic or provider email address, text message, invite via application, etc.). Verbal consent documented in the patient's chart is fine as a minimum. CMPA recommends the use of a signed informed consent form.

Principles:
- Clinic team members and providers should all be aware of the common clinic process is for informing patients and documenting consent.
- Where consent is documented in the EMR should be consistent so all know where to find the information. Consent needs to be documented once, not for every encounter.
- Documented consent can include patient portals.
- Consent is valid as long as the parameters of what the patient is consenting to does not change. For example, patient consented to virtual care today. In 6 months a patient portal is implemented in the clinic. Consent will need to be recollected/ re-signed as the patient did not agree to portal use in the original consent.

1) Electronic Consent Form

QHR Accuro has built a Virtual Care electronic consent form that will cover both in person and verbal consents. In the Publish/ Download library, search VIRTUAL CARE CONSENT. Download and use as needed.

2) Verbal

The clinic may collect consent verbally and use a Macro to document in the chart. When obtaining verbal consent the CPSA recommends this phrase be inserted into an encounter note:

"Informed verbal consent was obtained from this patient to communicate and provide care using virtual care and other communication tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information"

Build a Macro with the above paragraph alone or together with a SOAP note to insert consent quickly.

3) Paper form

Clinics may use a paper form. Print out a paper copy of the virtual care consent form from the EMR for in-person signing or the template below is also available from the CMPA here.

Always ensure that forms are scanned into the EMR using a standardized terminology such as "Electronic Communication Consent". This will enable searches and ease of finding this document if required.

Documenting consent in a standardized way

Once consent is collected, indicate this in a place where all providers and team know where it is located.

Option 1: Patient Flags

If you create and customize patient flags, remember to give all team members a list so they know what they mean. Once the flag has been created by the clinic it will appear beside the name in the name banner within the chart.
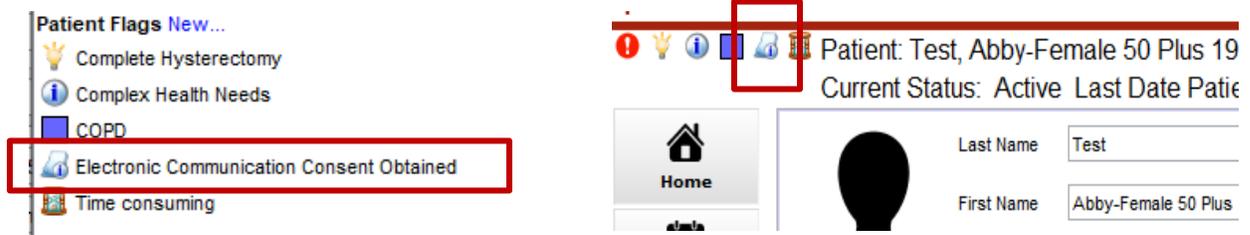
Creating Custom Flags

1. Press F7, Patient Tasks
2. Right-click anywhere on the white background and select New Flag.
3. Select "Manage"
4. To create using an existing icon select ⊕, the Edit Alert Flags window is displayed. Select ▼ and choose an icon from those displayed.
5. Type in the patient flag details in the field to the right of the flag icon.
6. Select OK to save the new flag.

Solid square icons can be created with various colors and used in place of icons. Search "Creating Custom Flags" in the Accuro hep files for more information.
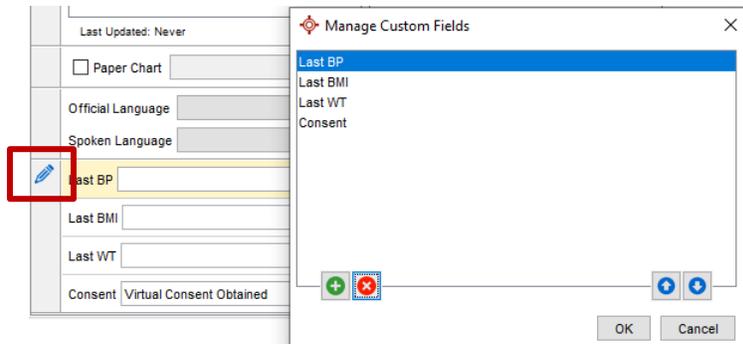
Option 1: Customize the name banner

By customizing the name banner, consent can be displayed for all members of the team regardless of whether they are in the chart or not. Below is an example of how it may look once configured.

Before configuring the name banner, the custom field must be created.

1. In the demographics screen under the "Other" tab, scroll down to the bottom
2. Select the blue pencil bottom left
3. Select and enter a field name, Select "Add". The field will now appear.

Next Customize the name banner

1. Select the Target > File > User Preferences
2. Select "Display" on left column > then Display again on the top ribbon
3. On Status bar Line 2, Type in "Consent" as shown below.
4. Right click on the line right after the word you just entered, Select "Patient", then "Custom Fields"
5. Select the custom field you just created.
6. "Apply", then "OK"

Special note: Another option for standardizing how consent is to add it to the medical history band. Creating a patient flag or customizing the name banner allows anyone on the team to see the information. In the Medical History Band, this would only be available when opening the chart. Decide what workflow is ideal for the practice.

COVID-19 Templates

QHR Accuro has created a template specifically for COVID-19 visits and screening. There are currently no generic templates for virtual care available in the Publish/ Download library. For clinics, with experience building custom forms and macros, the COVID-19 templates can be a good basis to create a more generic one for virtual care.

Check the Publish/ Download library for not only QHR Accuro created templates, but also forms created and used by other clinics in several provinces. Explore these to see if they would suit the practice and save time building new ones.
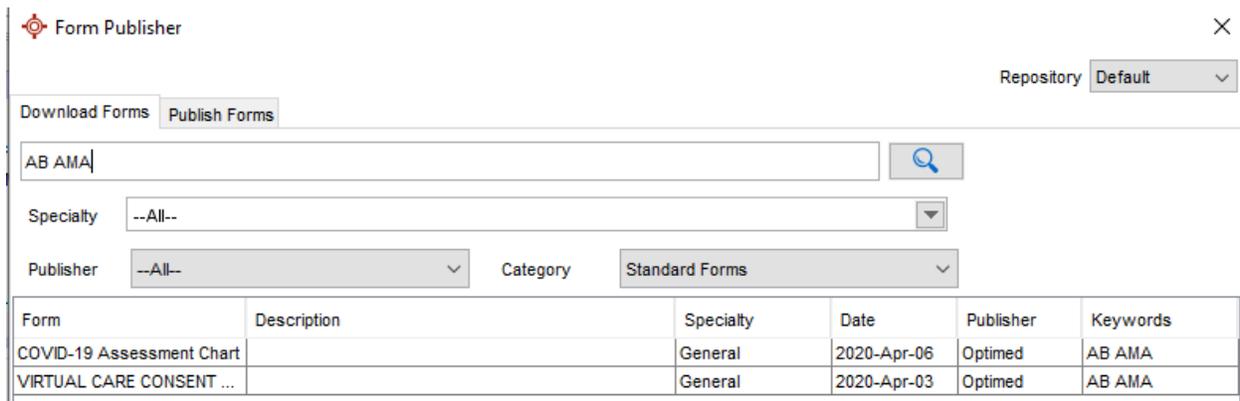
The COVID-19 Assessment Form (preview)

Virtual Visit Add-ons

QHR Accuro has additional services that are available for an additional fee.

Medeo Virtual Care and Secure Messaging

QHR Accuro EMR partnered with Medeo to offer virtual care options for patients and providers, reducing the strain on physicians and other medical staff. With secure video visits and messaging, physicians across Canada have the ability to conduct hundreds of online visits a day - from consultations, expedited specialist referrals, injury and pain management, mental health counseling, prescription renewals, and more. A video explaining this service is available here. A recent demo conducted by Accuro was recorded live with a group of physicians and can be watched here.

Medeo is being offered at no charge while the province is dealing with COVID-19. Ask Accuro for details.

Ocean Forms

Ocean provides a secure way to collect information from patients and automatically update the patient record in Accuro. Using mobile tablets, online questionnaires, and a library of thousands of forms and clinical screening tools, patients can contribute to their own medical record, making visits more efficient and improving clinical care.

Previews of COVID forms now available here.

Virtual Visits – Mobile EMR

Accuro Mobile EMR software provides access to patient information remotely and allows the practice to keep up with charting, messaging, and encounter notes – All from a mobile device. Links to more information can be found here

Virtual visit codes and fee

Virtual service codes are now available:

For more information, refer to the Alberta Health bulletin: Additional Virtual Care Codes for physicians during COVID-19 epidemic.

Effective March 12, 2020 Alberta Health has re-activated the health service code and diagnosis code used during the SARS pandemic - 03.01AD (telephone advice) and 079.82 (COVID-19-associated coronavirus). For more information, refer to the Alberta Health bulletin: Telephone Advice during COVID-19 epidemic and appropriate Diagnostic Codes.

Acknowledgement

References:

Alberta Medical Association: Virtual Care: Helping physicians minimize the risk of exposure to COVID-19
https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care

College of Physicians and Surgeons of Alberta: ADVICE TO THE PROFESSION
COVID-19: Virtual Care
http://www.cpsa.ca/wp-content/uploads/2020/03/AP_COVID-19-Virtual-Care.pdf